



California law provides, with certain limitations that a "Change in ownership" does not include the purchase or transfer of:

- The principal residence between parents and children, and/or
- The first \$1,000,000 of other real property between parents and children.

IMPORTANT: In order to qualify for this exclusion, a claim form must be completed and signed by all eligible transferors and transferees and filed with the Assessor within three years after the date of purchase or transfer, or prior to the transfer of the real property to a third party, whichever is earlier. If a claim form has not been filed by the date specified in the preceding sentence, it will be timely if filed within six months after the date of mailing of a notice of supplemental or escape assessment for this property. If a claim is not timely filed, relief may be granted beginning with the calendar year in which you file your claim. Complete all of Sections A, B, and C and answer each question or your claim may be denied. Proof of eligibility may be required.

Please note:

- a. This exclusion only applies to transfers that occur on or after November 6, 1986.
- b. In order to qualify, the real property must be transferred from parents to their children or children to their parents.
- c. If you do not complete and return this form, it may result in this property being reassessed.

A.. PROPERTY

ASSESSOR'S PARCEL NUMBER

PROPERTY ADDRESS		CITY
RECORDER'S DOCUMENT NUMBER		DATE OF PURCHASE OR TRANSFER
PROBATE NUMBER (If applicable)	DATE OF DEATH (If Applicable)	DATE OF DECREE OF DISTRIBUTION (If applicable)

The disclosure of social security numbers is mandatory as required by Revenue and Taxation Code section 63. 1. [See Title 42 United States Code, section 405(c)(2)(C)(i) which authorizes the use of social security numbers for Identification purposes in the administration of any tax.] A foreign national who cannot obtain a social security number may provide a tax identification number issued by the Internal Revenue Service. The numbers are used by the Assessor and the state to monitor the exclusion limit. This claim form is not subject to public Inspection.

B. TRANSFEROR(S)/SELLER(S) (additional transferors please complete'B"on the reverse)

1. Print full name(s) of transferor(s)
2. Social security number(s)
3. Family relationship(s) to transferee(s)  
If adopted, age at time of adoption
4. Was this property the transferor's principal residence? ☐ Yes ☐ No  
If yes, please check which one of the following exemptions was granted on this property in the transferor's name:  
Homeowners' Exemption Disabled Veterans' Exemption
5. Is this a transfer of real property other than the principal residence of the transferor (limited to the first one million dollars of value)? ☐ Yes ☐ No  
If **yes**, please attach a list of all previous transfers that qualify for this exclusion. [This list should include for each property: the County, Assessor's parcel number, address, date of transfer, names of all the transferees/buyers, and family relationship. Transferor's principal residence must be identified.]
6. Was only a partial interest in the property transferred? ☐ Yes ☐ No If yes, percentage transferred %
7. Was this property owned in joint tenancy? ☐ Yes ☐ No
- 8L If the transfer was through the medium of a trust, please attach a copy of the trust.

CERTIFICATION

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information hereon, Including any accompanying statements or documents, is true and correct to the best of my knowledge and that I am the parent or child of the transferees fisted In Section C

SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE	DATE
SIGNATURE OF TRANSFEROR OR LEGAL REPRESENTATIVE	DATE
MAILING ADDRESS	DAYTIME PHONE NUMBER
	( )

(Please complete applicable Information on reverse side.)

